Session 4: Module 4 - Demographics - Income Part 1 - Copy

FINAL

Description	Text
1. Introduction	**Welcome** to M-SPIRIT **Session 4, Module 4**, of the M-SPIRIT Required Online Training presented by the Montana Department of Public Health and Human Services WIC Program.
2. Start1	Income – Part 1
3. Start2	Copy to Current
4. Copy1	In the last few modules, we've reviewed all of the functionality in the Demographics except for the Income Eligibility component.
	The next couple of modules are going to focus on how to determine income eligibility.
	You are required to assess income eligibility in order to complete each certification.
	As always, follow state policy for determining income, which can be found in the State Plan, Chapter 5.
	The income calculator is located in the Demographics screen in the CGS.
5. Reminder	If you remember from the last module, M-SPIRIT does not include the income section in the Demographics required fields reminder and you will be able to exit and complete Demographics without it. However, M-SPIRIT will not allow you to complete a certification without an income record.
6. <incomepf>	In the Participant Folder, all of the household income contacts are displayed in the Income History tab.
	Income can be documented in the Participant Folder via the Add Income Screening Contact income calculator.
	This opens the same window as the income calculator in the Demographics of the CGS.
	Click on the icon to take a quick look.
7. <incomepf1>	We are going to be spending a fair amount of time discussing this screen in the CGS.
	Since we can't capture the entire Income Calculator window we will shift our view a little and show you the rest of it....
8. <incomepf2>	<no script>
9. <incomepf3>	Notice the Copy Items to Current Income button and the OK and Cancel buttons are also part of this window.

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	We are actually going to take a look at the Copy Items to Current Income functionality first.
10. \<copy\>	In the Details section below, we can see that Theodora Bear was just certified on March 3, 2011.
	Today's date is March 30, 2011, 27 days after the certification.
	Click on MAMA BEAR to highlight.
11. \<copy1\>	We need to certify MAMA. Open MAMA BEAR'S Participant Folder.
12. \<copy2\>	Open the CGS and indicate that MAMA is being certified as Pregnant.
13. \<copy4\>	\<no script\>
14. \<copy5\>	Great Job! Open Demographics.
15. \<copy6\>	The Monthly Income section in the Demographics screen in the CGS displays the annual income once it has been calculated.
	The Calculator icon opens the Income Calculator window and allows you to determine income eligibility.
	Click the Calculator icon.
16. \<copy7\>	The most recent income record at the top of the tree auto-updates as you complete information in the Income Calculator.
17. \<copy8\>	\<no script\>
18. Important!	It is important to understand that income is only automatically copied when certifications are performed on the same date.
19. \<copy9\>	The Income Screening Contacts section displays all household income records.
	It includes the date, amount per month, all proofs selected and the household size.
	If the record expands past the edge of the section...
	you can use the scroll bar at the bottom of the section…
	or hover your mouse over the line item to view the rest of it.
20. \<copy9\>	The Income Calculator window in the CGS is the same as the Participant Folder.
	Income is saved at a household level.
	Income only has to be entered for one household member when certifying multiple members at the same time.

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	The information will automatically be copied to another household member's record on that date.
21. <copy10>	<no script>
22. <copy11>	Below the Income Screening Contacts section is the Original Screening Date and the Copy Items to Current Income button.
23. Copy2	The Copy Items to Current Income button allows you to copy the exact same income if a household income record was already created within the past 60 days.
	The system will not copy the income record automatically. M-SPIRIT only automatically copies household income information when members are certified on the same date.
24. <copy12>	The date viewable in the Income Screening Contacts is the date the income was **recorded**.
	Since we can **copy** an income record, the date displayed may not be the date the income record was actually **created**.
	The Original Screening Date displays the date the income record was **created**.
25. <copy13>	For instance, when an income record is highlighted, the Original Screening Date is displayed below.
	Let's click on the 9/30/2010 income record.
26. <copy14>	IF the 9/30/2010 income record has been copied using the Copy Items to Current Income button, the Original Screening Date will be different from 9/30/2010, just as shown.
	What this shows us is that the income record for September 30th was originally documented on August 31st.
	This tells us two things:
	The first is that a member of the family originally provided proof of income on August 31st.
	the second is that the income record was copied on September 30th.
27. <copy15>	Notice that the Copy Items to Current Income button is still NOT enabled.
	This button only becomes enabled if the Original Screening Date of the highlighted record is within 60 days of the current date.

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	Click on the March 3, 2011 income record.
28. <copy16>	Remember, today is March 30, 2011.
	In this instance, the Original Screening Date is 08/27/2010.
	As long as this date is within 60 days of the current date, the Copy Items to Current Income button is enabled.
	Notice that the highlighted income record also auto-populates the Income Information section…
	Since we can copy this income record, click the Copy Items to Current Income button.
29. <copy17>	Once you copy the income record, the system will allow you make changes to the income record.
	However, you should NEVER do so!
	The Original Screening Date of the income you copied today was 17 days ago.
	You cannot make changes to a record created in the past.
	Once you've copied an income record, click the OK button to save it.
30. <copy18>	The Monthly Income amount then displays in the Demographics screen in the CGS.
31. Copy3	The purpose of the Copy Items to Current Income feature is to allow an income record to be re-used.
	If a household income has already been verified and documented in the past 60 days, you can re-use that information.
	This function is not meant to be used as a shortcut if you are documenting income information that is different in any way.
	For example, you should never copy income when verifying proof of income if the participant forgot to bring it to their certification appointment.
	In this instance, you would be documenting an income record with a different proof than was selected when the income record was originally saved.
	Since the income record is not exactly the same, a new income record should be created.

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32. Questions	Do you have any questions about what we just reviewed? If so, please submit them via the M-SPIRIT Frequently Asked Questions forum on the Montana WIC website.